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THE SUPPRESSION OF POPPY PRODUCTION
IN TURKEY

Turkey and the World's Opium Supply

The immediate withdrawal of Turkey from opium production would have no significant effect on the licit world supply. Legal world exports of opium in 1967 amounted to about 700 tons valued at \$8 million. India alone accounted for three-fourths of this total and could readily fill the gap left by Turkish withdrawal. Turkey, the second leading exporter, contributed about one-fifth of total world exports of opium in 1967 (Table 1). There is no shortage of opium for licit, medicinal purposes. On the contrary, price trends show the depressed state of the market from excess supply. Export prices of Turkish opium, for example, have been sliding downward in the following sequence, in prices per kilo: 1961 (\$19.20), 1963 (\$12.60), 1965 (\$11.60), and 1967 (\$11.10). The increasing use of synthetic substitutes is steadily displacing opium derivatives in the practice of medicine.*

Turkey's role as a source of opium and/or morphine for the illicit market is massive in comparison to the part it plays in the licit market. A third or more of total opium production in Turkey -- an estimated 60 tons out of 175 tons in 1967 -- enters the illicit trade. The overwhelming bulk of the illicit Turkish opium, now practically all in the form of morphine, is smuggled to the criminal syndicates in southern France and distilled into heroin. In terms of pure heroin the 60 tons of illicit Turkish opium is equal to 6 tons, an amount that supplies about 90 percent of the consumption in the West, defined to include Western Europe and North and South America. US consumption of heroin is estimated at from 2.5 to 3.0 tons, and 80% of this originates from Turkey via France, 15% from Mexico, and 5% from the Far East, chiefly Hong Kong.

* *Except for codeine probably no other opium derivative is essential for medicinal purposes today. A synthetic substitute for codeine cannot be produced economically as yet.*

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Table 1

World Legal Exports
of Raw Opium, 1967

	Quantity (Kilograms)	Value (US \$)	Price (US \$ per Kilogram)
Total World Exports	702,800	8,293,040	11.8
India	528,665	6,343,980	12.0
Turkey	156,136	1,733,110	11.1
Others	17,999	215,950	11.8
Including Exports to US	137,795	1,602,751	11.6
From India	78,162	941,191	12.0
From Turkey	59,633	661,560	11.1

Though only temporary, the disruption in the supply of heroin that would be consequent upon a rapid Turkish withdrawal from poppy production would be substantial. The extent to which the illicit market relies upon the Turkish source makes this judgment virtually inescapable. The pinch on supply would affect the victim countries throughout the Western world and most acutely the US with its relatively large addict population.

The domestic effect of the temporary disruption in the heroin supply from suddenly shutting off Turkey as a source -- and the best judgment is that the shortage would last from six months to one year -- cannot be forecast precisely. Some appreciation of the complexity of control problems after a disruption of supply, however, can be gained from the experience of Operation Intercept-Cooperation. With the closing of the Mexican border, there was an increase in the price of illicit drugs that brought about a 300% rise in forged prescriptions in California along with a rise in pharmacy break-ins.

The examples from Operation Intercept-Cooperation underscore the point that suppression of production in Turkey, no matter how complete, offers little prospect

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of permanently easing the US or world drug problem. Hence, the importance of viewing the suppression of poppy production in Turkey as only one phase of a continuing campaign that will be directed to US domestic consumption as well as to other countries that emerge as important sources of heroin supply.

The Significance of Poppy Cultivation in Turkey

From the point of view of the Turkish economy as a whole, poppy cultivation is of negligible importance. Legal exports of opium earned only \$1.7 million in foreign exchange for Turkey in 1967, or one-third of 1% of all export earnings. Even after taking account of illicit as well as licit production, poppy is a very minor crop in relation to agriculture as a whole which accounts for 30% of a total GNP of \$12 billion.

Income accruing to the agricultural sector from poppy production probably amounted to about \$4 million in 1967. Legal production accounted for about \$2.5 million, consisting of opium gum (\$1.1 million), poppy seed (\$1.2 million), and poppy straw (\$0.2 million). Of the total earnings from opium gum, more than half (\$1.3 million) represents the earnings to the Turkish farmers from illicit sales (Table 2). This assumes that one-third of the total crop was illicit and that the average price to the farmer for illicit gum was \$22 per kilogram as compared with the legal price of about \$10. These figures may be somewhat low but the total income to the farm sector for licit and illicit output of poppy products almost certainly does not exceed \$5 million.

The importance of poppy to the individual farmer who grows it is indicated by a comparison of the income he earns from that crop with his total income and, more crucially, with the cash component of his total income. Average income per farm in Turkey is about \$1,000 per year. In the main poppy-growing area centering around Afyon in the Anatolian Plain, however, average annual income per farm is one-third less than the national average per farm. Typically the poppy-growing Turkish farmer is restricted by the government to a very small plot of about one-quarter of a hectare. With a total of about 21,000 hectares under poppy cultivation in 1967, it can be calculated that each hectare yielded about \$200 from the various poppy products and that

Table 2

Estimated Income to Turkish Farm Sector
from Poppy Production

	US \$
Legal opium gum production	1,150,000 <u>a/</u>
Illegal opium gum production	1,320,000 <u>b/</u>
Poppy seed production	1,190,000 <u>c/</u>
Poppy straw	232,000 <u>d/</u>
<i>Total</i>	<i>3,892,000</i>

a. Officially reported production 114,963 kilograms times \$10, the price per kilogram to farmers.

b. Bureau of Narcotics and Dangerous Drugs estimates: illegal production of 60,000 kilograms at an average price of \$22 per kilogram.

c. Officially reported production of 7 million kilograms at a price of 17 cents per kilogram.

d. The straw yield is about 500 kilograms per hectare. Sown area was 20,600 hectares. About half the product is marketed at a price of 4-1/2 cents per kilogram.

on average the 80,000 poppy-growing farmers each earned about \$50 per year from the crop. This is a small (about 8%) but nevertheless significant portion of the average poppy farmer's total income.

Because it is a cash crop, poppy is even more important to the farmer than its contribution to his total income would indicate. Observers have noted the large inputs of fertilizer, hand-carried water, and labor lavished by the Turkish farmer upon poppy, his most intensively cultivated crop. In the areas where it is most concentrated, poppy is usually the principal cash crop, accounting for half and sometimes more of a farmer's total cash earnings. Much of this cash component of income provides working capital that is vital to the whole cycle of agricultural production.

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Although poppy provides key support to a segment of the Turkish agricultural economy as a cash crop, it does not divert much land or labor from other crop output. Poppy, as noted above, is restricted to a very small portion of the cultivated land, and the bulk of the crop -- about 70% -- is in the ground during the winter season, when wheat is virtually the only other crop under cultivation. Since wheat requires little care between planting and harvesting, the farmer has plenty of time to devote to the raising of poppy and the harvesting of opium gum at no real cost to other production.

Even though poppy is grown on land that is otherwise nonproductive during the winter, it causes serious mineral depletion and the land so used must be rotated. In addition, poppy is not harvested until late May or early June; therefore, this land cannot be used for spring planting of other crops. Also a summer crop frequently is planted that is harvested early in the fall. Finally, the growing of poppy is a risky venture, depending upon favorable climatic conditions during the period and critical timing for harvesting.

In effecting a cessation of poppy cultivation in Turkey, problems would arise from the fact that no direct substitute crop is available, i.e., another crop that can be grown in the same season and earn a comparable cash income for the farmer. Winter wheat is practically the only other crop worthwhile or even possible to grow and the value of its output per unit of land is only about 40% that of poppy. Substituting winter wheat for poppy therefore would at best be only a partial offset to the farmer for forgoing poppy production, particularly since it is less readily marketable than poppy.

The need to concentrate on spring crops indicates that crop substitution would be a difficult change in a way of life in Turkish farming, which would have to occur in initial conditions of low productivity and primitive techniques. Russian sunflowers, sugar beets, and grain sorghums also are technical possibilities for summer production in the Anatolian Plain given average rainfall. Yields are likely to be considerably lower, however, than in areas with more adequate moisture. Other crops may

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be feasible as partial substitutes but in any case the question of crop suitability is a technical one that has yet to be worked out by specialists and the test of experience. What can be concluded at this point is that because of the technical difficulties and also because of the need to change human habits, crop substitution that fully compensates for the suppression of poppy would probably take many years to complete; it certainly could not be accomplished overnight.

Alternative Means of Suppressing Poppy Production

Crop substitution can be advanced as the only sensible way to abolish poppy production in Turkey in the long-run, but pre-emptive buying could be quite useful in the short-term.* If, for example, Turkey planned to terminate poppy production next year or possibly the next, then many of the types of pre-emptive buying might be used to good effect. These might include: an attempt by the Turkish government to buy up the entire crop; US pharmaceutical firms buying more than their usual annual amount of Turkish opium and stockpiling the surplus supply (the US firms would probably agree to this); and even, if need be, some buying from the illicit market. To be effective even in the short-run, of course, pre-emptive buying from the farmer presumes the ability to offer a price sufficiently high so that he receives an income at least equal to his usual income from licit and illicit production combined.

The Costs of Suppression and a Crop Substitution Program

The first principle to accept if the objective is to assure getting Turkey out of poppy production rapidly is the superiority of a multi-faceted attack on the problem. At the outset it seems safe to assume that no single approach -- such as plowing under the crop -- would be completely successful. Even with a combination of approaches complete success in the first year of the effort is probably not attainable. A multi-faceted attack, however, promises the greatest gains within the shortest time. To go a step further, the attack would from

* *Extensive pre-emptive buying in the long-run, of course, would only stimulate production.*

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the beginning address itself not only to controlling supply from the 1970 crop or suppressing future production but it would also from the beginning develop a crop substitution program. [REDACTED]

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[REDACTED] The need for US assistance and, as appropriate, participation in the effort would be taken for granted.

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The suppression aspects of a multi-faceted attack on Turkish poppy production would entail no very great costs. If the Turkish government were to attempt to buy the entire 1970 crop and fully compensate the farmers for their previous licit and illicit income, the cost could range from \$4 million to \$5 million. The Turkish government might possibly decide, moreover, to wait a year and purchase the 1971 crop also before enforcing a discontinuance of production. Considering the complexities of the enforcement task, the US aid appropriation to the Turkish police, \$1.4 million, probably represents a very conservative estimate of the likely costs.

The final bill for a crop substitution program would exceed the \$1.6 million US aid to Turkey currently in the pipeline for this purpose. Crop substitution costs at this stage are, of course, unpredictable. Depending on the scope of the definition, the total bill for crop substitution could be quite large. Aside from the initial cost for capital and technical assistance for starting new crops, the viability of the program would ultimately require educational and other costs that would be essential to raising the general level of agricultural technology. At some unknown point the expenditures on crop substitution would merge with the large costs of the development process itself. As will be argued below, however, there is little danger that the US would have to assume the burden of many of these larger developmental costs.

Turkey's Enforcement

The Turkish government has fairly strong political capabilities to enforce the suppression aspects of a crop substitution program. Prime

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Minister Demirel has both the prestige and popular appeal to be secure and effective in his leadership. The Turkish bureaucracy could reasonably be relied upon to make strong efforts to enforce suppression if it were ordered to do so. [REDACTED]

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[REDACTED] Some indication of the Turkish capability for controls may be seen in the government's regulation of poppy acreage, traditionally on individual farms and more recently in reducing the number of provinces where poppy is grown, reportedly from 21 in 1967 to 11 in 1969. A government purchasing organization, TMO, monopolizes the legal opium trade and sets the production quotas that determine how much gum each farmer must deliver to the state. The Turkish monopoly usually purchases the amount of opium gum it thinks it can sell on the world licit market. This normally leaves the farmer with a surplus which he disposes of illicitly, usually for more but sometimes for even less than the government price.

Despite its considerable political capabilities, however, the Turkish government would find it difficult to enforce complete suppression of poppy production within a short period, say, two years. Demirel cannot be expected to blithely ignore the economic interest of the farm-owning poppy growers, who are politically the most influential segment of the population in their part of Anatolia. Rather than risk alienating the farmers he would doubtless prefer to sweeten poppy prohibition with full compensation for production forgone. In any event, [REDACTED]

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it seems evident that he will resist taking action as drastic as plowing under the 1970 crop. Even though the Turkish police are relatively efficient, the essentially intractable nature of crop acreage control in general should also be considered. A pertinent example is the difficulties the US government encounters and the efforts it continuously exerts to control domestic tobacco and rice acreage. An additional enforcement problem of unknown proportion is the stockpiles of illicit opium that may exist in Turkey. Still, if the Turkish government were assured that outside financial aid would be

available, its capability and probably its will to enforce suppression would be enhanced. In the first and possibly even the second year of a suppression effort, this aid would probably have to include funds for TMO to purchase all it could of the poppy crop.

Turkey probably does not have the capability to carry out a crop substitution program on its own within a short period of time. Thus far, not even a plan for a crop substitution program has been drawn up, and no Turkish request has been made to utilize any of the \$1.6 million the United States made available in September 1968 for crop substitution. In the circumstances there is nothing surprising in this lack of response. As explained above, crop substitution for the summer season on the Anatolian Plain is an unknown if not unknowable quantity. Mere appropriations of AID dollars may contribute very little to the solution of the problems when no searching technical studies of production possibilities have been made and no plans set forth for model experiments. The Turks lack the trained scientific and technical personnel to conduct the required planning alone. At present, moreover, the US is in no position to quickly advise them as to the best crops and required input packages. The relatively backward state of agricultural technology in the poppy areas and the persisting conservative attitude of the farmers toward innovation further impair the Turkish capability to advance crop substitution.

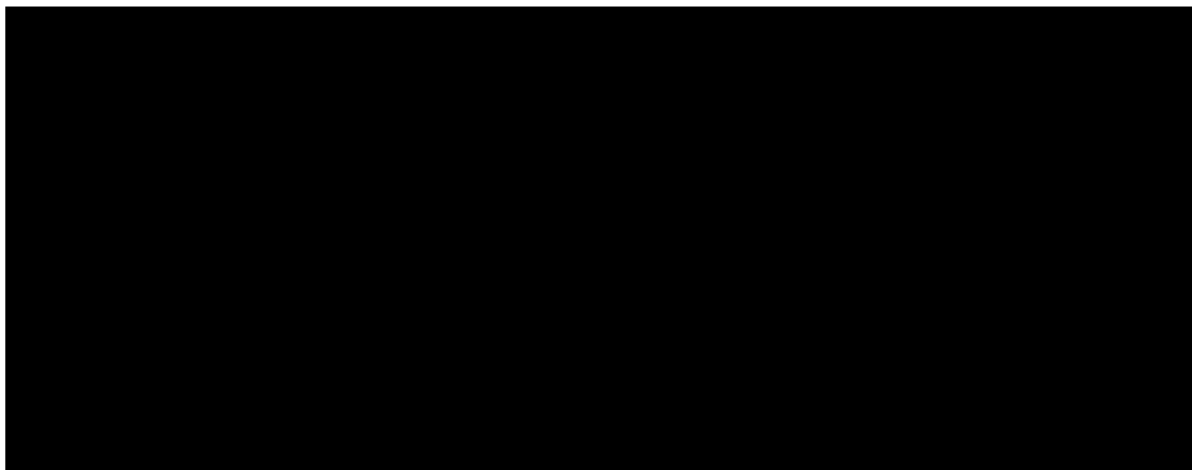
From the standpoint of the US the costs of effecting a cessation of poppy production in Turkey should be quite manageable, even when crop substitution is taken into account. If the US paid the entire costs of the suppressive aspects of the program (compensation to farmers plus police costs), the bill would still amount to less than \$5 million for purchasing all the opium in any one year plus some probably lesser cost for assistance to the Turkish police. As for crop substitution, the US is unlikely to be able to spend money very quickly in any case, for a real beginning has yet to be made. If, however, the aim is to assure an effective crop substitution program, there would be an urgent need to increase substantially the amount of US aid already allocated for this purpose. Even with a substantial increase the cost to the US

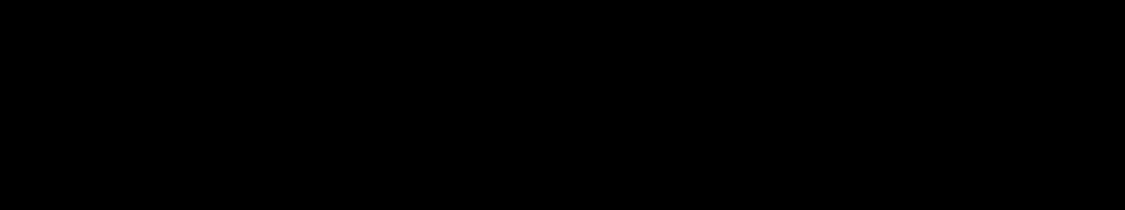
would not need to be excessive. The Turks themselves presently have little insight into the cost potential of crop substitution, especially as the costs would relate to larger developmental costs. They would therefore be likely to consider any additional US aid as a bonus and it might give spur to their incentive.

It is implicit that if the aim is to make aid to Turkey for crop substitution effective, then that aid would have to be based on a long-term US involvement. The present US aid allocated for crop substitution is thus inadequate in regard to long-range planning as well as in terms of a realistic appraisal of costs.

Under present guidelines there may be an impairment to the US capability to effect a cessation of poppy production in Turkey by means of official assistance. To put the maxim that AID dollars alone are not enough in another way: the speed of utilization is of the essence. Whatever the responsibilities of the Turks themselves, none of the deliveries against the aid to the Turkish police had actually been made as of November 1969. Approved orders against this police aid so far amount to only \$440,000 out of the \$1.4 million made available. As could have been anticipated, Turkish police officials have been quick to protest their incapacities for suppression in recent talks with their US counterparts, citing the non-delivery of technical equipment as justification. Not only did Turkish police officials cite the delayed deliveries of technical equipment but so have higher governmental authorities, including the Under Secretary of the Ministry of Interior.

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ConclusionsGeneral Feasibility

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A US effort to effect a suppression of poppy production in Turkey appears feasible, if a multifaceted attack is made on the problems that would arise. This presumes that the US effort would include official aid to the Turks for both suppression and crop substitution purposes. In view of Turkish political and control capabilities and the US capability for economic support, it is possible that production could be almost completely suppressed within a two-year period. The crop substitution program, however, would require a long-term commitment of US aid.

Political Action

Because US participation in Turkish suppression and crop substitution programs would mostly be open to public observation, the manner or "style" with which the US effort is administered could be crucial not only for its success but also for the preservation of sound and harmonious US-Turkish relations. US involvement is almost certain to increase the visibility of the US presence in Turkey, a circumstance likely to increase the sensitivity of Turkish feelings toward US power.

1. Mount advance planning exercises in anticipation of difficulties for US-Turkish relations that might arise from US involvement.
2. Draw up specific guidelines for conduct of US personnel to be directly involved in Turkish suppression or crop substitution programs.
3. Set 1971 as the first target year for suppression of opium production by the Turkish government.

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Economic Assistance

In general the urgent needs are for a speedy utilization of aid once specific allocations have been approved and for launching research and planning efforts when the appropriate uses of aid are in question. Recent experience indicates that slow utilization of aid for the Turkish police could hinder enforcement of suppression. If accountability requirements or other administrative procedures on the US side are such as to preclude more rapid utilization, these should be streamlined. No effective crop substitution program is likely to materialize until extensive research and planning has been carried out.

For Pre-emptive Buying

1. Offer the Turks the sum required for purchase by their government of the entire 1970 opium gum harvest. Consider figures in the range of \$4 million to \$5 million.
2. Advise the Turkish government and TMO to set a price to the farmer for opium such that he would be fully compensated for his previously illicit production and have no incentive to sell opium in the illicit market.
3. Further persuade TMO to revise quotas upward for farm deliveries of opium to the state, so that little of the product would be available for illicit buyers in any case.
4. In order to ease the strain on TMO from the resulting large inventory of opium, request US pharmaceutical firms to buy and stockpile an amount equal to past illicit production, say, about 60 tons.

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5. Revise the existing US import quota on opium to allow for the resulting increase in imports.
6. Consider pre-emptive buying in the illicit market only as an extreme measure of last resort and then only with the knowledge and support of the Turkish authorities. Otherwise we will run afoul of their suppression forces and their harsh penalties against illicit traffickers, thereby risking situations acutely embarrassing to both governments.

For Turkish Police

1. Streamline administrative procedures if necessary in order to speed up deliveries of equipment to the Turkish police.
2. Make a technical study of Turkish police requirements for suppression and control, with a view to increasing the present AID allocation to the police in support of any proposed program.

For Crop Substitution

1. Set a more realistic figure for US aid for this purpose. Consider, to start with, what could be accomplished with \$8 million to \$12 million.
2. Prepare for a long-term AID commitment for Turkish crop substitution.
3. Set machinery for planning and research in motion that focuses on the problems peculiar to the agronomy and horticulture of areas where poppy is grown.

Some Cautions and Long-Term Considerations

The suppression of poppy production in any single country cannot by itself disrupt the international supply of heroin for long. Given the world distribution of poppy production over many areas subject to limited control, especially the Far East, supply would soon increase to meet any conceivable demand. Given, moreover, the present capabilities of the illicit marketers, new channels of supply most likely would be developed in a relatively short time. In addition, any US effort to halt illicit poppy production in one country would risk adverse consequences for the US, both internally and in its external relations. Higher prices for heroin would almost certainly boost crime rates in drug-victim countries while the treatment bill for their addicts would be suddenly raised. Certain risks would be incurred to the relations between the US and the producing country targeted for a suppression program, risks that would escalate unless the most careful methods of US participation were employed.

Despite the short-term impact on supply, the undesirable effects, and the possible risks, however, there are offsetting gains that might justify a US policy decision to effect a cessation of poppy production in one country, especially an important source of supply like Turkey.

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The moral gain to Turkey and the lustre added to its world image may also be noted as the Turkish government regards opium production as undesirable and is pledged to its complete eradication after 1972.

However worthwhile the possible gains, the selection of Turkey as a priority target would make little sense unless the US effort there were viewed as only part of a larger program embracing the build-up of domestic controls and rehabilitation. The effort in Turkey as well as the ongoing effort in Mexico should also be viewed as only the first of many similar efforts in a series of

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opium-producing countries. As already noted, there is little doubt that channels in the illicit market would readily shift.

Since a program of the requisite size in Turkey could certainly not remain "invisible," it should probably be publicized as a joint US-Turkish effort not only to stamp out an evil but also as a first step toward a viable crop substitution program directly beneficial to Turkey and potentially beneficial to other countries.

If it is assumed that Turkey -- as the major source of opium for the heroin supply -- is the most likely priority target country, then the relative advisability of various means that might be employed toward the cessation of production becomes a key issue. Capabilities on both the US and Turkish sides must be examined. It is essential that the program launched entail the minimum risks to US-Turkish relations. Only in light of all these issues can the feasibility of abolishing poppy production in Turkey in the near-term future, say this year or next, be assessed.